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Canned Deciduous Fruit

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Report Highlights:

Snowstorms and low temperatures in January and February 2002 reduced peach production by nearly 30%, with a similar reduction in deliveries to canners. Trees recovered and were in bloom in the first week of April 2003 when they were hit by a killing frost. The 2003 peach harvest is expected to be 235,000 tons, slightly less than the 2002 harvest. Apricots were unaffected and 50,000 tons are expected.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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SECTION I SITUATION AND OUTLOOK NARRATIVE

Canned Peaches

Production

Adverse weather conditions during January 2002 reduced canned peach production by almost 30% compared to a year earlier. As cited in GR 2018, snowstorms followed by low temperatures during January-February 2002 caused severe damage to the trees which has resulted to a 28% drop in clingstone peach production compared to the 2001 crop. An equal reduction was also reported in the quantity of peaches delivered to processors in 2002, which reached the amount of 238,000 MT (final figure).

The damage to peach trees, which caused this drastic reduction in the 2002 crop, did not affect the tree population which recovered quickly. Although 2003 output was expected to be comparatively higher than 2002, and nearly to approach normal levels due to favorable weather conditions which prevailed until the 1st week of April. However, sudden snowstorms and low temperatures in Central Macedonia occurred April 7 and 8 and this affected the crop very badly and changed all predictions for this coming harvest. After these developments, and based on preliminary estimates, provided from both processors and peach farming groups, the quantity of fresh fruit delivered to processors will be around 235,000 MT, subject to better damage assessment. This figure represents peaches coming from a few areas which were not totally damaged, and expected to be sent to canneries. Reportedly, there were pockets where temperatures dropped down to 2oC and many trees managed to survive. In other regions, within the growing area, temperatures went down to -3 or -4 and killed all blooming branches.

Peach production data for the MY 2001/02 and for MY 2002/03 reported by the Ministry of Agriculture are as follows:

	2001	2002 Metric Tons
Peaches		
Clingstone	532,400	385,000
Freestone	249,579	211,004
Total Peaches	781,979	596,004

The utilization amounts for the 2001 and 2002 peach crops based on more recent data provided by the Ministry of Agriculture are as follows:

	2001	2002 Metric Tons
Processed for canned Peaches	330,000	238,000
Processed for other products (pure, diced, frozen)	129,127	20,000
Fresh Domestic Production	125,959	211,384
Fresh Exports	110,480	76,474
Total Marketed Peaches	695,566	537,858
Withdrawals	73,422	5,551
Farm Use and Waste	12,991	52,595
Total	781,979	596,004

Due to a shortage of fresh fruit through 2002, farmers managed to obtain high prices from the processors, which reached the amount of 0.22 Euros/kg (the EU price subsidy is not included in this amount). For the 2003 crop the corresponding payment is forecasted to be more or less at the same level as last year, due to limited output expected after the sudden weather damage.

The MY 2001/02 was distinguished by stiff competition among processors to obtain fresh fruit. According to industry contacts, during the processing period, most farmers managed to obtain high prices for fresh peaches delivered to plants based on mutual agreements made with some processors. Reportedly, some processors offered a little more to farmers over the initially agreed price, (about 0.015-0.030 Euro/kg). The result of such agreements was, that a few plants operated under full capacity, contrary to other plants, which did not manage to gather the required amount of fresh product. It became obvious that this tactic has caused some friction between processors. This situation may repeat again in 2003 because of the small harvest expected.

Consumption

As cited in previous reports, Greek consumers prefer fresh fruit instead of canned fruit. However, for all of 2002 there were extremely high prices at the consumer level throughout the Greek fresh fruit and vegetable market, mostly due to bad weather conditions. If this phenomenon continues and taking into consideration the frequency of these changes in the Mediterranean climate, it will be possible to see increased domestic consumption of canned fruit in the future. This assumes that incomes will not keep pace

with increases in the price of fresh fruit.

Stocks

According to our trade sources ending stocks by the end of MY 2002/03 will be at 50,000 MT, which correspond to approximately 2,450,000 boxes (24x 1 kgr). The amount of stocks (March 2003) is estimated at around 120,000 MT. Sales until June 2003 will be close to 60,000 MT. Starting in 2001 there is an intentional reduction in a tendency in the peach industry ending stocks. Processors claim they want to organize and coordinate their production according to predicted market demand. By the end of MY 2003/04, stocks are estimated to be around 42,400 MT.

Policy

In line with the EU Third Support Framework for Agricultural Restructuring Plans for Countryside Development 2000-2006 (EU Reg. No.1257/1999), the majority of processors have submitted applications for participation. This EU plan targets mainly the modernization of production and not capacity increases. This modernization includes renovation of buildings and equipment of processing plants. 45% of the total amount is covered by the EU (subsidy), 30% by bank loan and the rest is covered by their own capital.

Greece expects to receive from the EU the total amount of 3.4 billion Euros in the line of the Third Support Framework 2000-2006. According to the Greek Ministry of Finance, as of October 2002, 75% of the above total has been activated and 7,500 applications, from all sectors, have been submitted to be subsidized by the Third Support Framework.

The amount of 233.9 million Euros is allocated for agricultural development, which also includes applications from the processing sector. It is very useful to mention that the corresponding amount for projects which target the environmental protection investments is 7.6 billion Euros, which demonstrates the EU intention to support environmental protection within the framework of agricultural development.

According to GOG statistics, Greece has under-utilized funds from the EU. The use of funds has been slower than expected, mostly due to bureaucratic delays. Business participation in the program to date is only 13% utilization of the total EU amount for the support of the agricultural development.

Some seven processing plants have submitted applications to qualify for EU Third Support funds. The level of investment fluctuates between one to three million Euros per application.

Most of these investments also include funding for construction and maintenance of waste treatment plants, renovation of equipment and production line modernization, with the understanding that no increase of capacity will take place.

According to industry, farm groups face chronic financial problems, which are very difficult to overcome. The majority of them are kept viable due to loans extended by the Agricultural Bank of Greece. Rarely do farm groups have the premises to pay back these loans.

Farmers, on the other hand, are dissatisfied with the groups, due to the high amount withheld for operational expenses. These expenses do not seem justified at 0.03-0.035 Euro/kg of fresh fruit.

Processors plan to establish their own Producer Groups, which is not only a way for them to reduce price payments to farmers, but also a means to disengage from any payments owed to Farmers' Groups. This reduction of payments will occur for those operational costs mentioned above which also affect the processors, including an amount paid directly to farmers. According to EU Regulations in effect, Processors are S.A companies which, by law, are qualified to organize and form Farm Groups. A large number of peach farmers are ready to join these schemes and major processing companies are considering joining.

Farming Groups face high administrative and management costs due to over-hiring of personnel and high operating costs. They require steep contributions from their members (farmers). Individual processors or groups of processors, who may form their own "farming" groups, are prepared to cover all administrative costs involved, from within their own administrative operations and free farmers from additional payment obligations.

In the framework of CAP reform, EU funds are expected to be shifted from direct payments to farmers based on production (price subsidies), to payments per area. The Commission will propose amendments of EU Regulation 1257/1999, which refer to Agricultural Support, and other supports through the expansion of the environmental protection activities. CAP reform also will set minimum farming standards on environment and food safety. For the peach sector, farmers will be subsidized for uprooting old trees and replace them with new varieties or totally abandon tree orchards.

These changes are causing anxiety within the farming community, which considers these measures as EU policy which indirectly favors products of Northern EU countries. The support of Mediterranean products such as olive oil, fresh fruit and vegetables, tobacco and cotton according to Panhellenic Confederation of Agricultural Cooperatives should be negotiated during the Greek or Italian presidencies.

Note: the Greek presidency ends at the end of June. The Italian presidency follows immediately.

Greek Farming Cooperatives believe that CAP reform targets unfairly traditional family ownership, but supports larger farm areas. For Greece, this measure will have a detrimental effect on farmer's income due scattered farm area and small family ownership on average. Greek cooperatives believe that subsidies should be allocated according to product quality, which would benefit.

Peach farmers mainly in the North of Greece do not have many alternative cultivations. The peach industry is the only reliably profitable market for them. Apricots seem to be an alternative cultivation but due to low prices, on the international market and low processing demand, farmers are not very willing to shift to apricots. Also, some attempts to grow apricot trees in the peach zone were not very successful due to local weather conditions not favorable for apricots.

Pears, mainly new varieties, are a more profitable crop. Greece appears to have a shortage of fresh pears and increased demand in the processing sector for canned mixtures. A new pear variety named "Snow",

which originates in China, seems to be gaining in popularity among farmers in North Greece. "Snow" pears have great potential to be channeled to the processing sector and also to the fresh market. This fruit variety, which looks like an apple, is considered to be very suitable for processing due to the growing fruit's firm flesh. Compared to apricots, pear cultivation is better adapted to areas currently growing peaches, such as Pella and Imathia prefectures due to climate and soil conditions.

Processors complain about old peach varieties which farmers are unwilling to abandon or replace. Andros, the most traditional late variety, matures in the second half of August and is cultivated by the majority of farmers due to good yield. Processors prefer earlier varieties such as A37 and A39.

Processors report shrinkage in their profit margins this year and are expecting this to get worse unless something changes in the peach sector. According to sources in the canning industry, the main problem is the high production cost, which emerges from relatively high prices paid to farmers last year but mainly from high operating expenses. The establishment of their farmer groups and the reduction of permanent staff are among their goals for the years to come.

For the 2002 crop the grower price paid by the processors, was set at 0.22 Euro/kg. On top of it, farmers still receive the support price of 0.047 Euro/kg set by the EU. Processors do not receive any subsidy as described in Annual Report GR2004.

In a good year with high peach output, grower prices are much lower compared to that in a year with a low output. Large crops negatively affect farmers' incomes when there are no other alternatives but to deliver their peaches to processors at a very low price especially during July and August, the most intensive processing period. On the other hand, quantity and prices paid for withdrawal, which are allowed only for a 10% of the total marketable production, as well as for quantities delivered for juices, are not satisfactory to farmers.

According to contacts in the farming sector, GOG compensation payments to peach farmers, who declared damage to their peach production, due to adverse weather conditions in 2002, are still not completed. Payment procedures are under way.

The export rebates for products containing sugar are governed by Articles 16 to 18 of Council Regulation (EEC) No. 2201/96. Since 1 January 1997 those provisions are in effect.

Presently, the price of sugar in the Community is at 0.716 EURO/Kg which is much higher than the world market price (at approx. 0.282 EURO/Kg), due to the setting of minimum prices. In order to allow the export of canned fruit products containing sugar sourced within the Community under normal conditions of competition, the cost of the added (Community) sugar is brought back to the prevailing world price by granting a refund on export. The amount of the refund is calculated on the quantity of sugar contained in the processed product and reflects the minimum difference between the Community sugar and the world sugar prices cited above.

Both Greece and Spain operate schemes by which processors are able to import sugar from the world market (i.e. non-EU sources) free of duty for use in the production of goods, which are subsequently exported. No rebate is paid on goods containing sugar purchased under these schemes. This is the scheme used by most producers of canned peaches.

According to sources in the Greek processing industry, sugar used in the production of canned peaches exported to third countries is also sourced from within the European Community (in this case supplied by the Hellenic Sugar Industry). This was confirmed in subsequent visits to the producers themselves.

Due to the volatility of the world sugar market the rebate amount is calculated on a weekly basis by a unit of the EU and takes into account movements in sugar (commodity) prices on London and Paris exchanges.

The sugar rebate, also known as sugar restitution, is based on the sugar content per 100kg of finished product. Sugar content is determined by analysis of a sample of each production run from each processor carried out by a government laboratory. Processors make application to the relevant GOG agency, generally the Ministry of Agriculture, on a weekly basis during the production season and must provide detailed information regarding the goods exported including a draft of declarations and certificates. Following both documentary and physical checks, the rebate is approved and paid. At present, the time between application and payment is up to fifteen months. This program provides for refunds based on the sugar content of goods exported outside of the EU and aims to compensate exporters for the higher cost of sugar in the EU compared to world prices.

Trade

The small peach crop in 2002 due to adverse weather conditions of January 2002 caught processors by surprise for a certain quantity, which was sold at a lower price because they entered the international market with early bookings and lower export price commitments.

Bookings for the upcoming new peach crop take place early every year starting in March or April based on the supply and demand situation in foreign markets.

These are indicative export prices for canned peaches for MY 2002/03

Standard quality for A3 packing

July-August	10.75 euros
September-November	13.50 euros
January-March	12.75 euros

Choice quality for A3 packing

July-August	12.50 euros
September-November	12.80 euros
January-March	13.20 euros

Export price varies according to packaging and season. Recent shipments to the EU and other countries reached 14 Euros for A3 packing.

According to processors most of them have already set their production level according to quantity expected to be demanded when enough fruit is available to be processed. This means that they prefer to settle production according to demand rather than having to face too many stocks in the end of the marketing year.

Due to adverse weather conditions which prevailed for two consecutive years in 2002 & 2003 trade sources are expecting problems in satisfying foreign market demand and Greek peaches will be absent from these markets until the primary sector recovers fully.

According to processors, when new members from Eastern Europe enter the EU, Greek canned peach exports are expected to increase due to the economic development in these countries. The introduction of the Euro as their lawful currency, the improvement of their standard of living and dietary habits, in general, will contribute to the increase of Greek exports.

Exports to Eastern Europe now take place in large quantities but with delays in payments plus a 17-18% tariff. Due to tariffs which burden Greek exports to third countries, the difference in export price between these countries and the EU is around 0.53 Euro per 1 carton Box (24x1kg)

According to the National Statistic Service the total quantity of canned peaches quantity exported from January to November 2002 is 305,403 MT and the total value is 205,571,324 Euros. The corresponding numbers for 2001 C.Y are 446,853 MT and 220,059,668 Euros.

Canned Mixtures

Production

Production of canned mixtures was not affected by the short peach crop, but was hampered mostly by the short pear crop. Greece does not seem to reach the quota level in pear crop production. According to the Ministry of Agriculture fresh pear production in MY 2001/02 was at 54,750 MT. From this amount 6,000 MT were channeled to the processing sector, mostly of Williams and Rocha varieties. In MY 2002/03 only 3,822 MT went for processing. The Greek Canning industry imports pears from Spain, Italy and Argentina.

Trade

Indicative ex-factory price for standard quality is approximately at 18.0 Euros and for choice quality at 18.5 Euros. Canned mixtures production is reported to show an upward trend in recent years. Trade in canned mixtures faces stiff competition from Italy.

Policy

There is no any GOG or EU support for canned mixture production. Production and Trade policy for this particular product is directed by the individual canning industries and their associations who follow international market demand closely. Fruit mixtures are produced throughout the year and for longer periods, keeping processing plants under operation by using ready available raw material, which is either domestic or imported.

Pears are the only ingredient subjected to EU Agricultural Policy Regulations regarding production quota and price subsidy payments to growers.

Only a few Greek fresh fruit processors provide facilities (production lines) for canned mixtures and fruit salad production. Being members of the Cannery Association they organize their output according to international market demand levels.

Canned Apricots

Production

Adverse weather conditions through January 2002 and April 2003 did not affect fresh apricot production as much as expected. Apricots are cultivated mostly in Southern Greece where extreme weather conditions through winter 2002 and spring 2003 were not too severe compared to those in the North of Greece. For 2002 crop, fresh apricot production is estimated at 49,883 MT compared to 2001 crop which was at 45,886 MT. 2003 output of fresh apricots is expected to reach approximately 50,000 MT or a little over.

The utilization of the 2001 and 2002 apricot crops, based on recent available data, is as follows (2002 figures are preliminary data based on further revision).

	2001 (MT)	2002 (MT)
Processed for canned apricots	11,500	14,000
Processed for other products	13,000	20,000
Fresh Domestic Production	7,384	4,776
Fresh Exports	11,922	6,745
Total Marketed Apricots	43,806	45,521
Withdrawals	414	13
Farm Use and Waste	1,666	4,349
Total	45,886	49,883

Trade

Total exports of canned apricots in CY 2002 are based on preliminary data provided by the NSS, and are estimated at 15,849 MT with a total value of 14,006 Euros.

An indicative export price for canned apricots is at 18-20 Euros for 24x1 kgr pack for EU destinations.

Policy

Apricots are considered to be a very promising cultivation for the processing industry, despite their sensitivity to soil and cold winter weather conditions, which dominate in Northern Greece. For the past season due to lack of enough amounts of available peaches, processors have preferred to use more apricots. This keeps their facilities in operation. This tactic may continue during the upcoming campaign of 2003.

On the other hand, the apricot crop is declining in the Southern part of Greece as a result of spreading of Sharka virus, which destroys the fruit's skin and makes fruit unsuitable for processing.

Contrary to the processed products, exports of fresh fruit from Greece are declining more and more due to low international markets prices. Apricot is one of the products already seriously affected by low prices. Restructuring of the crop towards new varieties suitable for processing, seems to be the solution for both farmers and processors.

Exchange Rates:

Jan-April 2003 \$1.00 = 0.928 euros

PS&D Table, Canned Peaches

PSD Table						
Country	Greece					
Commodity	Canned Peaches				(MT)(MT, Net Weight)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		06/2001		06/2002		06/2003
Deliv. To Processors	330000	330000	230000	238000	0	235000
Beginning Stocks	121300	121300	57000	57000	20400	50000
Production	407000	407000	276000	285500	0	279600
Imports	1000	1000	1300	1500	0	1800
TOTAL SUPPLY	529300	529300	334300	344000	20400	331400
Exports	458300	458300	300900	285000	0	280000
Domestic Consumption	14000	14000	13000	9000	0	9000
Ending Stocks	57000	57000	20400	50000	0	42400
TOTAL DISTRIBUTION	529300	529300	334300	344000	0	331400

Export Trade Matrix, Canned Peaches

Export Trade Matrix			
Country	Greece		
Commodity	Canned Peaches		
Time period		Units:	MT
Exports for:	2001		2002
U.S.	13229	U.S.	14293
Others		Others	
France	22446	France	12119
Germany	147133	Germany	81851
U.K.	38513	U.K.	27869
Italy	24849	Italy	19877
Belg-Lux	12621	Belg-Lux	6819
Other EU	24611	Other EU	18227
>Sub Total EU	270173	>Sub Total EU	166762
Poland	26757	Poland	22406
Canada	24570	Canada	15078
Russian Federation	15884	Russian Federation	12959
Total for Others	337384	Total for others	217205
Others not Listed	96240	Others not listed	73905
Grand Total	446853	Grand Total	305403

National Statistic Service provides preliminary data for C.Y. 2002 for the period January to November 2002 (11 month period).

Import Trade Matrix, Canned Peaches

Import Trade Matrix			
Country	Greece		
Commodity	Canned Peaches		
Time period		Units:	MT
Imports for:	2001		2002
U.S.		U.S.	459
Others		Others	
Germany	230	Germany	1110
France	29	Italy	869
Other EU	226	Other EU	288
>Sub Total EU	485	>Sub Total EU	2267
Canada	764	South Africa	1143
North Africa	184	Egypt	55
Egypt	74		
Total for Others	1507	Total for Others	3465
Others not Listed	91	Others not Listed	0
Grand Total	1598	Grand Total	3924

National Statistic Service provides preliminary data for C.Y. 2002 for the period January to November 2002 (11 month period).

PS&D Table, Canned Apricots

PSD Table						
Country	Greece					
Commodity	Canned Apricots				(MT)(MT, Net Weight)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		06/2001		06/2002		06/2003
Deliv. To Processors	11500	11500	8500	14000	0	15000
Beginning Stocks	1697	1697	247	247	2647	1147
Production	14000	14000	17000	17000	0	18200
Imports	350	350	400	400	0	300
TOTAL SUPPLY	16047	16047	17647	17647	2647	19647
Exports	15000	15000	13500	15000	0	17000
Domestic Consumption	800	800	1500	1500	0	1600
Ending Stocks	247	247	2647	1147	0	1047
TOTAL DISTRIBUTION	16047	16047	17647	17647	0	19647

Export Trade Matrix, Canned Apricots

Export Trade Matrix			
Country	Greece		
Commodity	Canned Apricots		
Time period		Units:	MT
Exports for:	2001		2002
U.S.		U.S.	
Others		Others	
Germany	5032	Germany	4304
France	5738	France	4723
Italy	2183	Italy	1028
UK	850	UK	830
Other EU	1316	Other EU	946
>Sub Total EU	15119	>Sub Total EU	11831
Russia	1373	Russia	1200
Poland	520	Poland	557
Czechia	352	Czechia	651
Croatia	80	Croatia	162
Total for Others	17444	Total for Others	14401
Others not Listed	1168	Others not Listed	1448
Grand Total	18612	Grand Total	15849

National Statistic Service provides preliminary data for C.Y. 2002 for the period January to November 2002 (11 month period).

Import Trade Matrix, Canned Apricots

Import Trade Matrix			
Country	Greece		
Commodity	Canned Apricots		
Time period		Units:	MT
Imports for:	2000		2001
U.S.		U.S.	
Others		Others	
Germany	130	Germany	316
France	23	UK	38
Other EU	100	Other EU	26
>Sub Total EU	253	>Sub Total EU	380
Turkey	3278	Turkey	561
Total for Others	3531	Total for Others	941
Others not Listed	18	Others not Listed	224
Grand Total	3549	Grand Total	1165

National Statistic Service provides preliminary data for C.Y. 2002 for the period January to November 2002 (11 month period).

PS&D Table, Canned Mixtures

PSD Table						
Country	Greece					
Commodity	Canned Mixtures				(MT)(MT, Net Weight)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		06/2001		06/2002		06/2003
Deliv. To Processors	0	0	0	0	0	0
Beginning Stocks	3843	3843	4343	4343	1643	4243
Production	28000	28000	33600	30000	0	28000
Imports	500	500	300	900	0	600
TOTAL SUPPLY	32343	32343	38243	35243	1643	32843
Exports	25000	25000	33500	28000	0	25500
Domestic Consumption	3000	3000	3100	3000	0	3000
Ending Stocks	4343	4343	1643	4243	0	4343
TOTAL DISTRIBUTION	32343	32343	38243	35243	0	32843

Export Trade Matrix, Canned Mixtures

Export Trade Matrix			
Country	Greece		
Commodity	Canned Mixtures		
Time period		Units:	MT
Exports for:	2001		2002
U.S.	3800	U.S.	
Others		Others	
UK	3165	UK	2935
Belgium-Lux	1000	Belgium-Lux	1829
Germany	2092	Germany	3602
Other EU	5614	Other EU	2681
>Sub Total EU	11871	>Sub Total EU	11047
Japan	3196	Japan	1849
Canada	1737	Canada	2820
Mexico	18	Egypt	504
Egypt	258	Russian	86
Russian	194		
Total for Others	17274	Total for Others	16306
Others not Listed	4565	Others not Listed	2687
Grand Total	25639	Grand Total	18993

National Statistic Service provides preliminary data for C.Y. 2002 for the period January to November 2002 (11 month period).

Import Trade Matrix, Canned Mixtures

Import Trade Matrix			
Country	Greece		
Commodity	Canned Mixtures		
Time period		Units:	MT
Imports for:	2000		2001
U.S.		U.S.	
Others		Others	
Germany	924	Germany	773
France	370	France	77
Belgium-Lux	184	Belgium-Lux	268
Italy	159	Italy	346
Other EU	30	Other EU	219
>Sub Total EU	1667	>Sub Total EU	1683
Thailand	24	Thailand	63
Total for Others	1691	Total for Others	1746
Others not Listed	92	Others not Listed	6
Grand Total	1783	Grand Total	1752

National Statistic Service provides preliminary data for C.Y. 2002 for the period January to November 2002 (11 month period).